

**STATE OF WASHINGTON,
OFFICE OF THE SECRETARY OF STATE,
DIVISION OF ARCHIVES AND RECORDS MANAGEMENT**

REQUEST FOR PROPOSALS

RFP NO. 13-05

PROJECT TITLE: CONNECT WITH YOUR LIBRARY: A MOBILE APP FOR WASHINGTON

PROPOSAL DUE DATE: FEBRUARY 1, 2013

EXPECTED TIME PERIOD FOR CONTRACT: April 1, 2013 – December 31, 2014

PROPOSER ELIGIBILITY: This procurement is open to those firms that satisfy the minimum qualifications stated herein and that are licensed to do business in Washington State.

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1. INTRODUCTION

1.1 PURPOSE AND BACKGROUND

The Washington State Office of the Secretary of State, Washington State Library Division, hereafter called "Agency," is initiating this Request for Proposals (RFP) to solicit proposals from firms interested in participating on a project to develop and provide a mobile application ("app") for public and academic libraries in Washington.

Background: The Washington State Library has applied for, and been awarded funding from the Paul G. Allen Family Foundation to support this project. In addition, some funding will come from federal Library Services and Technology Act (LSTA) monies made available through the Institute for Museum and Library Services (IMLS).

The LSTA funding will be used to support the development phase of the project. This funding expires at the end of the 2012 Federal Fiscal Year (September 30, 2013), and therefore, the development must be basically complete, with a functioning product delivered, and up and running for two or more participating libraries prior to that date.

Allen Family Foundation funding will be used to pay for one full year of public library subscription costs for the app with an anticipated subscription start date of January 1, 2014, running through December 31, 2014. The period between September 30 and December 31, 2013 will be used to bring the rest of the participating libraries online with the application. Allen Family Foundation funding will be used for marketing the project to Washington citizens as well as for direct project costs.

Both public and non-profit academic libraries will be eligible to participate in the project, but one year of subscription funding will be provided to public libraries only. Academic libraries that participate will do so using their own funding. Public libraries will be expected to provide their own funding after the one year of provided subscription funding expires.

1.2 OBJECTIVE

The objective of this project is to provide a Mobile application (app) that will run on all standard mobile device platforms, and which will provide library information and services to the citizens of Washington via the app.

The app should provide services and information such as library hours and location(s), library calendar of events, access by library patrons to their library accounts, easy access to online library resources such as downloadable eBooks and audiobooks, library subscription databases, library social media platforms, and the like. The full array of required and desirable features are listed the body of the RFP.

1.3 MINIMUM QUALIFICATIONS

Firms responding to this RFP must have the following qualifications:

1. Licensed to do business in the state of Washington.
2. A minimum of one (1) year of experience providing services similar to those described in this RFP.

1.4 FUNDING

The Agency has budgeted an amount not to exceed \$200,000 for the public library portion of this project (see Section 1.1. Purpose and Background for more information). The budget for the academic library portion of the contract is not specified, but should be in line with the public library fees.

Any contract awarded as a result of this procurement is contingent upon the availability of funding.

1.5 PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about March 1, 2013 and to end on December 31, 2014. Amendments extending the period of performance, if any, shall be at the sole discretion of the Agency.

1.6 DEFINITIONS

Definitions for the purposes of this RFP include:

Agency – The Office of the Secretary of State, Washington State Library Division is the agency of the state of Washington that is issuing this RFP.

Contractor – Individual or company whose proposal has been accepted by the Agency and is awarded a fully executed, written contract.

Customer – The citizens of the state of Washington, as represented by the Connect with your Library Advisory Committee on behalf of the libraries of Washington State.

Proposal – A formal offer submitted in response to this solicitation.

Proposer – A vendor (individual or company) submitting a Proposal in response to this RFP.

Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific solution to achieve it has been chosen. The purpose of an RFP is to permit the vendor community to suggest various approaches to meet the need at a competitive price, and to identify the solution that best meets the needs of the library community.

1.7 ADA

The Agency complies with the Americans with Disabilities Act (ADA). Proposers may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

2. GENERAL INFORMATION FOR PROPOSERS

2.1 RFP COORDINATOR

The RFP Coordinator is the sole point of contact in the Agency for this procurement. All communication between the Proposer and the Agency upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name	Will Stuiivenga
Address	Washington State Library PO Box 42460
City, State, Zip Code	Olympia, WA 98504-2460
Phone Number	360.704.5217
Fax Number	360.586.7575
E-Mail Address	will.stuiivenga@sos.wa.gov

Any other communication will be considered unofficial and non-binding on the Agency. Proposers are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Proposer.

2.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Proposals	January 11, 2013
Question and answer period	January 12 - 18
Suggested deadline for receipt of Letter of Intent to Propose	January 15, 4:00 p.m.
Place addendum to RFP on Agency web site: (if applicable)	January 19, 2013
Last date for questions regarding RFP	January 18, 2013
Proposals due	February 1, 2013
Evaluate proposals	February 4 - 15
Conduct oral interviews with finalists, if required	February 11 - 15
Announce "Apparent Successful Contractor" and send notification via e-mail to unsuccessful proposers	February 19
Hold debriefing conferences (if requested)	February 23 - 25
Negotiate contract	February 19 - 28
File contract with OFM (if required)	February 28
Begin contract work	March 1

The Agency reserves the right to revise the above schedule.

2.3. LETTER OF INTENT TO PROPOSE

Vendors interested in participating in this proposal process are requested to have an authorized representative provide a Letter of Intent to Propose via e-mail (preferred), fax, or mail to the RFP Coordinator ASAP, but no later than January 15, 2011, 4:00 PM, Pacific Time.

This Letter should provide a Primary Contact for the Proposer, with contact information for the Primary Contact, including phone number(s) and e-mail address. All communications from the RFP Coordinator will be sent to the Primary Contact.

While failure to submit a Letter of Intent to Propose shall not disqualify a Proposer from submitting a Proposal, without receipt of said letter, Proposers will not be notified of any amendments to this RFP, or be provided with Questions and Answers.

2.4 SUBMISSION OF PROPOSALS

Proposers are required to submit two (2) printed/paper copies of their proposal, both of which must have original signatures. The proposal, whether mailed or hand delivered, must arrive at the Agency no later than 4:30 p.m., local time, on February 1, 2013.

In addition, an electronic version via e-mail (preferred) or in a physical electronic format such as CD-ROM or USB flash drive, must be provided, using Microsoft Word as the format for the electronic format proposals. If the electronic version is provided in a physical format, two separate physical copies must be provided. An electronic version provided in a format that cannot be easily edited (e.g., PDF), will be considered nonresponsive. Proposals may not be transmitted using facsimile transmission (fax).

In an effort to save costs, reduce waste and produce energy savings, Proposers should use standard 8-1/2" x 11" recycled paper, double-sided printing, and are encouraged (not required) to use recyclable binders.

The proposal is to be sent to the RFP Coordinator at the address noted in Section 2.1. The envelope or package should be clearly marked to the attention of the RFP Coordinator.

Proposers mailing proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Proposers assume the risk for the method of delivery chosen. The

Agency assumes no responsibility for delays caused by any delivery service. Proposals may not be transmitted using electronic media such as facsimile transmission.

Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of the Agency and will not be returned.

2.5 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Materials submitted in response to this competitive procurement shall become the property of the Agency.

All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Director of the Agency and the apparent successful Contractor; thereafter, the proposals shall be deemed public records as defined in RCW 42.17.250 to 42.17.340, "Public Records."

Any information in the proposal that the Proposer desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.17.250 to 42.17.340 must be clearly designated. The page must be identified and the particular exception from disclosure upon which the Proposer is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right hand corner of the page.

The Agency will consider a Proposer's request for exemption from disclosure; however, the Agency will make a decision predicated upon chapter 42.17 RCW and chapter 143-06 of the Washington Administrative Code. Marking the entire proposal exempt from disclosure will not be honored. The Proposer must be reasonable in designating information as confidential. If any information is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.17.300. No fee shall be charged for inspection of contract files, but twenty-four (24) hours notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

2.6 REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be published on the Washington Electronic Business Solution (WEBS) (<http://www.ga.wa.gov/webs>) and Agency web site: <http://www.sos.wa.gov/office/procurements.aspx>. **[NOTE: or e-mailed to those who either received the RFP or who responded with a Letter of Intent to Propose, as applicable]** For this purpose, the published questions and answers from the preproposal conference and any other pertinent information shall be considered an addendum to the RFP and also placed on the web site.

The Agency also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

2.7 MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with the legislative findings and policies set forth in chapter 39.19 RCW, the state of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply.

The established annual procurement participation goals for MBE is 8 percent and for WBE, 4 percent, for this type of project. These goals are voluntary. Bidders may contact OMWBE at 360/753-9693 to obtain information on certified firms.

2.8 ACCEPTANCE PERIOD

Proposals must provide 90 days for acceptance by Agency from the due date for receipt of proposals.

2.9 RESPONSIVENESS

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The Proposer is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

The Agency also reserves the right, however, at its sole discretion, to waive minor administrative irregularities.

2.10 MOST FAVORABLE TERMS

The Agency reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the Proposer can propose. Agency reserves the option to conduct a best and final offer procedure. The Agency does reserve the right to contact a Proposer for clarification of its proposal.

The Proposer should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or the Proposer's entire proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to the Agency.

2.11 CONTRACT AND GENERAL TERMS & CONDITIONS

The apparent successful contractor will be expected to enter into a contract which is substantially the same as the sample contract and its general terms and conditions attached as Exhibit B. In no event is a Proposer to submit its own standard contract terms and conditions in response to this solicitation. The Proposer may submit exceptions as allowed in the Certifications and Assurances section, Exhibit A to this solicitation. The Agency will review requested exceptions and accept or reject the same at its sole discretion.

2.12 COSTS TO PROPOSE

The Agency will not be liable for any costs incurred by the Proposer in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP

2.13 NO OBLIGATION TO CONTRACT

This RFP does not obligate the state of Washington or the Agency to contract for services specified herein.

2.14 REJECTION OF PROPOSALS

The Agency reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

2.15 COMMITMENT OF FUNDS

The Director of the Agency or his/her delegate are the only individuals who may legally commit the Agency to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.16 ELECTRONIC PAYMENT

The state of Washington prefers to utilize electronic payment in its transactions. The successful contractor will be provided a form to complete with the contract to authorize such payment method.

2.17 INSURANCE COVERAGE

The Contractor is to furnish the Agency with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The Contractor shall, at its own expense, obtain and keep in force insurance coverage which shall be maintained in full force and effect during the term of the contract. The Contractor shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to the Agency within fifteen (15) days of the contract effective date.

Liability Insurance

1. **Commercial General Liability Insurance:** Contractor shall maintain general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the "each occurrence" limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the "each occurrence" limit. CGL insurance shall be written on ISO occurrence form CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insureds (cross liability) condition.

Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

2. **Business Auto Policy:** As applicable, the Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than \$1,000,000 per accident. Such insurance shall cover liability arising out of "Any Auto." Business auto coverage shall be written on ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

Employers Liability ("Stop Gap") Insurance

In addition, the Contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

Additional Provisions

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The state of Washington, Office of the Secretary of State, its elected and appointed officials, agents and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the State.

2. **Cancellation.** state of Washington, [agency name], shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the State 45 days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the State shall be given 10 days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The State shall be given 20 days advance notice of cancellation. If cancellation is due to non-payment of premium, the State shall be given 10 days advance notice of cancellation.
3. **Identification.** Policy must reference the State's contract number and the agency name.
4. **Insurance Carrier Rating.** All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best's Reports. Any exception shall be reviewed and approved by [Agency Name] Risk Manager, or the Risk Manager for the state of Washington, before the contract is accepted or work may begin. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with chapter 48.15 RCW and 284-15 WAC.
5. **Excess Coverage.** By requiring insurance herein, the State does not represent that coverage and limits will be adequate to protect Contractor, and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to the State in this contract.

Worker's Compensation Coverage

The Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The State will not be held responsive in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

3. PROPOSAL CONTENTS

Proposals must be submitted on eight and one-half by eleven (8 1/2 x 11) inch paper with tabs separating the major sections of the proposal. The four major sections of the proposal are to be submitted in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A to this RFP).
2. Technical Proposal.
3. Management Proposal.
4. Cost Proposal.

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Proposer in preparing a thorough response.

Proposals should be straightforward and concise and provide "layman" explanations of technical terms that are used. Emphasis should be focused on responding to the RFP requirements, on providing a complete and clear description of the Proposal, and conforming to the RFP instructions. If a complete response cannot be provided without referencing supporting documentation, such referencing should be provided with the Proposal indicating where the supplemental information can be found. Proposals that merely offer "to provide services as described in this RFP" may be considered non-responsive and may not be considered for further evaluation.

Whenever the verb "describe" is used, please substitute "briefly describe," and keep descriptions succinct, while providing adequate information to explain whatever is being described. When expressions like "e.g.," or "such as" are used, the items which follow are to be treated as examples of

the concept in question, and not necessarily as an exhaustive list. Responses should address the concept in its entirety, and should not be limited to the specific examples provided.

Items in this section marked "mandatory" must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked "scored" are those that are awarded points as part of the evaluation conducted by the evaluation team.

3.1 LETTER OF SUBMITTAL (MANDATORY)

The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A to this RFP) must be signed and dated by a person authorized to legally bind the Proposer to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Proposer and any proposed subcontractors:

1. Name, address, principal place of business, telephone number, and fax number/e-mail address of legal entity or individual with whom contract would be written.
2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.).
3. Legal status of the Proposer (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
4. Federal Employer Tax Identification number or Social Security number and the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue.
5. Location of the facility from which the Proposer would operate.
6. Identify any State employees or former State employees employed or on the firm's governing board as of the date of the proposal. Include their position and responsibilities within the Proposer's organization. If following a review of this information, it is determined by the Agency that a conflict of interest exists, the Proposer may be disqualified from further consideration for the award of a contract.

3.2 TECHNICAL PROPOSAL (SCORED)

The Technical Proposal must contain a comprehensive description of services including the following elements:

A. Project Approach/Methodology – Include a complete description of the Proposer's proposed approach and methodology for the project. This section should convey that Proposer understands the proposed project.

Describe the Proposer's approach to this project. Specifically, list and describe the major activities Proposer will undertake to complete the project, with proposed timeline and/or deadline(s) for each activity. Do not, however, duplicate (other than in general terms), information provided in other sections of the Proposal.

For each feature or function included in the Proposal, describe any data or information that participating libraries need to provide to the app developer(s), and describe the format in which such data or information is to be provided, and the mechanism(s) by which such data or information will be collected and made available to the app developer(s). This information should be provided in the sections of the Proposal devoted to responding to the request for technical requirements, specifically, Sections 3.2.1, 3.2.2, and 3.2.3. Failure to address the issue of how required data or information is provided for any particular feature or function will result in a lower score for that item.

Note: If the same format(s) and/or method(s) of collecting data are used for multiple features or functions, it is only necessary to describe any particular format and/or method once, and for

subsequent features or functions that use the same format and/or method for providing information or data, simply refer back to the previous description.

B. Work Plan – Include all project requirements and the proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP. This section of the technical proposal must contain sufficient detail to convey to members of the evaluation team the Proposer's knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of Agency staff. The Proposer may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.

The specific questions relating to technical elements of the proposal have been divided into four categories, three of which are organized according to their importance or weight. These sections are delineated as follows:

- 3.2.1. Highly Desirable Features
- 3.2.2. Desirable Features
- 3.2.3. Features that are also desirable, but less important
- 3.2.4. Standard Business Considerations

Satisfactory responses to questions regarding "Highly desirable" features will be weighted more heavily (receive a larger number of points) than satisfactory responses to the "Desirable" questions, which will, in turn, be weighted more heavily than responses to the "also desirable, but less important" category.

Within these categories, features have been grouped into related areas which have been labeled as seems appropriate.

In the case that a particular feature or group of features is not available in the Proposer's product, a simple "Not available" is sufficient. If there are plans for adding this feature in the future, they may be described, but only currently available features will receive full credit in scoring.

If a similar or related feature is available, it may be described, unless it is already covered in another section of the proposal. Do not duplicate information; rather, if a feature is already covered in another section of the proposal, please refer to it instead.

3.2.1 Highly Desirable Features

3.2.1.1. General Requirements

- 1. Compatibility with existing phones and devices

It is considered highly desirable for the app to be compatible with all commonly used platforms, and both current and previous models of devices (phones, tablets, etc.), going back at least three (3) years.

- a. List the platforms and classes of devices on which the proposed solution will run, and also list any known incompatibilities (platforms and devices).
- b. Describe any device or platform testing program(s) or similar endeavor(s) undertaken by the Proposer to ensure compatibility with the majority of devices available on the market and those currently in the hands of consumers.

- 2. Updates for new phone models and new operating system/platform releases

It is considered highly desirable that throughout the term of the contract and subscription(s) the Proposer provide at no additional charge any updates to the app that are required for compatibility with new models of phones that are released during the term of the contract and its related subscription(s), and any new versions of supported operating systems or platforms.

Describe how the Proposer deals with the release of new devices (phones, tablets, etc.), new versions of existing devices, and device operating systems, and describe any situations in which libraries would

be required to pay additional fees to enable support for newer device models, and newer versions of operating platforms, etc.

3. Low-tech vs. high-tech option(s)

Some participating libraries will have highly sophisticated technical skills and support available on staff; others may have very little. For this reason, it is considered highly desirable to have options available to libraries for the level of technical involvement that is available for their staff in interacting with the app and its customization and/or administrative features.

Definition of “customization”: For this aspect of the proposal, customization is defined as being able to modify the library's logo, links that are available from the app interface, library branch address information, library branch hours, library branch images, library website feeds, and any other content that is considered to be customizable for each library and/or library branch.

Definition of “high tech” option: Self-administered customization is available, requiring knowledge of web development or at least access to web development tools, but including the ability to customize the app directly via a web interface. If this option is available, please describe the mechanism for administration/customization of the app.

Definition of “low tech” option: Easily administered customization is available. No knowledge of web development or access to web development tools is required. If this option is available, please describe the mechanism for administration/customization of the app.

Proposals that offer both a “high tech” and a “low tech” option for libraries to administer the customization of the app will be scored higher than those that do not offer both options..

4 Analytics and Usage Statistics

It is considered to be highly desirable that libraries have access to useful, relevant, customizable, and easily accessible usage statistics and analytics for the mobile “app.”

Describe the usage statistics and analytical reports that are available for the proposed app solution:

- a. Enumerate the time intervals for which statistics can be generated (daily, weekly, monthly, annually, etc.).
- b. Describe any provided options for customizing the statistics (e.g., select date range, select from various reporting and display options, etc.)
- c. Can statistics be obtained by the Customer without vendor intervention whenever desired? Describe the interface used for generating usage statistics.
- d. Can statistical reports be set to run automatically, and be e-mailed to the Customer at set intervals?
- e. Can statistical reports be generated for the entire state or consortium, and be divided by type of library (academic, public, size of library, etc.)?
- f. Can statistical reports be generated by and for each individual participating library?
- g. All usage statistics should be available for download or export into spreadsheet format, as well as available for immediate display on screen; list all available display and output format options;
- h. Is relevant metadata included in each statistical report? That is, are data such as the title of the report, the time period covered by the report, and other report parameters automatically included in the body of the report itself and/or in the text of the e-mail message or other display information that accompanies a report?
- i. Provide examples of standard usage or other analytical reports that are available to library and project managers. These may be provided as separate documents (addenda), or within the body of the Proposal, whichever is more convenient and conducive to effectively presenting the report examples.

At a minimum libraries would like to see the following (check off all those that are available and provide notes or descriptive text as appropriate):

- j. Unique number of app downloads;
- k. Number of subsequent uses per download (for example: in the specified period, x number of downloads received no subsequent uses, x number received 1-5 subsequent uses, x number received 6-10 subsequent uses, etc.; the actual breakdowns provided can be based on an intelligent parsing of the available data; describe any preset or available breakdowns);
- l. Usage statistics broken out by which app menu options were used and how much each was used;
- m. Usage statistics on library functions that were completed through the app (e.g., catalog searches, holds placed, accounts accessed, OverDrive downloads, and holds placed, etc.); list any functions accessible through the app that can or cannot be counted and reported;
- n. Usage statistics broken out by platform, type of device, and app version;
- o. Describe any other available usage statistics or analytics options or data that are available.

5. Security and Privacy

It is considered highly desirable that the privacy of the app user and the security of the app user's information be respected and protected. Describe the Proposer's approach to privacy and security in general, and in response to the following specific questions:

- a. Provide a copy of the Proposer's current privacy policy, and indicate how or if it would or could be modified for the current Proposal;
- b. Is it feasible or desirable to develop a privacy policy specifically for the app, and why or why not?
- c. Describe how the app or Proposer's privacy policy is made accessible to the end user via the app itself; describe any notification provided to the app user prior to providing sensitive (personal or authentication) information/data via the app;
- d. Address the issue of user data/information privacy; is any user data made available to third parties (other than the library or Agency), and if so, under what circumstances, and for what purpose? Does the Proposer ever provide user data to third parties for compensation (i.e., sell the data)?
- e. Describe the security used for transmitting data, especially authentication and other sensitive data, from the app to the Proposer's servers or system; is such data encrypted?
- f. Is security available for the user at the device level, e.g., can the user set security or a password on the app, such that if someone other than the user is using the device, that person cannot access the primary user's library account(s) without access to that security?
- g. Describe any specific security or privacy features that are aimed at younger users, i.e., children;
- h. The Future of Privacy Forum has released a "Best Practices for Mobile App Developers," which is available at <http://www.futureofprivacy.org/best-practices-for-mobile-app-developers/>. Indicate how the Proposer's privacy and security policy and procedures relate to the guidelines provided by this document.
- i. Describe or provide any other relevant information related to the Proposer's approach to protecting and respecting user privacy, data security, etc.

3.2.1.2. Library Information

1. Library locations

It is considered highly desirable that the app provide basic location and directory information for participating libraries.

It is considered highly desirable that the app user be able to select and save his/her library location, branch, system, etc. The save feature should be as automated as possible, requiring little or no effort on the part of the user.

- a. Describe how the app user can select his/her library from all of the other libraries statewide that are represented on the app, and how the user can save this preference for future reference.
- b. Describe how the user can change this saved setting, if he/she changes libraries later.
- c. Describe how the app provides library location and directory information, including address, GPS or mapping data for locations, phone number, web site URL, branch locations (for multi-branch systems), etc.
- d. Describe any capability provided by the app for including directory related graphical images, such as pictures of library branch locations. List all supported graphical formats, and any image technical requirements or specifications (resolution, image size restrictions, etc.).
- e. Describe the process by which the libraries provide their location information, images of library branches, etc. to the app or to the app developer. Ideally this process should require a minimum of effort on the part of the library. If the Proposer can accept location data from an existing database or directory, describe what information can be provided in this manner, and what data formats can be processed.

2. Hours of operation

It is considered highly desirable that the app provide each library's regular hours of operation, as well as making provision for holiday and exceptional hours.

- a. Describe how the library hours are accessed and displayed.
- b. Describe the process libraries use to update their hours of operation when needed, including provision of holiday or other exceptional hours schedules.
- c. Describe the process by which the libraries provide their hours of operation to the app or to the app developer. Ideally this process should require a minimum of effort on the part of the library. If the Proposer can accept location data from an existing database or directory, describe what information formats can be processed.

3.2.1.3. ILS Integration

1. ILS Integration in general

It is considered highly desirable that the app be compatible with the Integrated Library Systems (ILS) in use by participating libraries.

- a. List all Integrated Library Systems for which or to which the Proposer has (as of the date of the proposal) provided integration.
- b. List any known ILS's for which integration cannot currently be provided.
- c. For those ILS's listed in section (b) as being ILS's for which integration cannot currently be provided, please provide a description of any plans to accommodate said ILS's, including any progress currently underway, as well as the anticipated development time required for those ILS's to be accommodated in the app in future.

2. Mirror the catalog

It is considered highly desirable that the app be able to “mirror” the library’s catalog as much as possible, providing search and other data that is up-to-date, and that matches what would be found in the same search executed directly.

- a. Describe the technical means by which library catalog data is incorporated into the app, or accessed by the app, and any requirements for the library in providing its catalog data or access to it. Ideally this process should be transparent to the library and its staff, requiring little or no extra work on their part.
- b. Specify any lag time in providing catalog data to the app, and the frequency of any required data dumps or other transfer of catalog data between the ILS and the app.

3. Catalog Search

It is considered highly desirable that the user be able to search the catalog in a variety of ways, including by keyword, title, author name, series, format, subject, and item availability. Apps that provide a way for the user to “facet” searching (by format, subject, etc.) will be scored more highly than those that do not.

4. My Account

It is considered highly desirable that the user be able to access his/her library account, with the same or near identical functionality that is available through the native ILS interface.

Describe the “My Account” functionality that is available through the app, and list or describe any native ILS account functionality not available through the app.

The user should be able to:

- a. Log in and review the account;
- b. The app should remember/store the user’s library card number and PIN for future logons.
- c. See what items are currently checked out, and when they are due;
- d. Renew items eligible for renewal;
- e. Change the PIN;
- f. Change the e-mail address associated with the account;
- g. Engage in any other activities allowed through the native interface;
- h. Users should be blocked for excessive fines or charges in a manner congruent with the native interface;

5. Manage Holds

It is considered highly desirable that the user be able to manage holds with the same functionality as through the native ILS interface. To the extent that these functions are available in the ILS, users should be able to:

- a. Place holds at the bib-specific (“request any copy”) and item-specific (“request this copy, normally residing at this branch”) levels;
- b. Check the status of items currently on hold;
- c. Release, suspend, or delay holds;
- d. Adjust the holds pickup location;
- e. Access and activate any other holds-related functions normally available via the ILS.

Describe the holds management functionality that is available through the app. Indicate which holds management features are available through the app, and list any that are NOT available.

3.2.1.4. Links to Other Services

It is considered highly desirable that the app be able to provide links to other library services, including those provided by third parties. Specifically, as listed here, describe the capability and functionality that the app can provide for linking to or from the following:

- a. RSS feeds from the library website, ILS, third party providers, or other sources;
- b. Washington State's "ask a librarian" service, aka Ask-WA, has a mobile app available on both the iOS and Android platforms. Describe any ability for the app to mirror or mimic the functionality of those apps, to launch the existing native app if present, and to prompt the user to download the Ask-WA app if it is not found on the user's mobile device. Describe any other "ask a librarian" virtual reference service functionality provided through the app.
- c. Integration with digital download services, such as eBook, eAudiobook, and music or video services from vendors such as OverDrive, Recorded Books, 3M, Baker & Taylor (Axis 360), Library Ideas (Freeding, Freegal), and any others that are currently supported or implemented for other library clients;
- d. Links to search and retrieve results from subscription databases, such as ProQuest, Gale, EBSCO, and any others that are currently supported or implemented for other library clients;
- e. Describe how such links deal with third-party authentication issues, if applicable. Can the app provide pass-through authentication to any of the resources described in sections (c) or (d), either via the user's barcode and PIN, or via use of any other shared authentication method? What other authentication issues have been encountered and resolved?
- f. Describe the method by which the library provides information on desired links to the app developers.

3.2.2. Desirable Features

The features described in this section are considered to be desirable, but not as high a priority as those described in Section 3.2.1.

3.2.2.1. General Requirements

1. App software upgrades

It is considered desirable that participating libraries receive without additional cost any app software upgrades that the company releases during the subscription period.

Describe the Proposer's policy with regards to release of software updates for the "app," including any circumstances under which a participating library would be required to pay additional fees or costs.

2. Multilingual and translation options

It is considered desirable that the app offer multilingual and/or translation options.

- a. Describe any multilingual or translation options offered through or by the app;
- b. List any languages other than English for which the app provides support (interface or translation capabilities).

3. Auto populate forms

It is considered desirable that the app be able to auto populate forms with information when appropriate or feasible. Examples include the ability to auto populate a purchase/ILL request form when an item is not found in the library catalog when using an ISBN lookup, or other search.

Describe any auto populate capabilities provided by the app:

- a. Describe any circumstances under which the app can auto populate a form with the user's personal information (name, e-mail address, phone number, etc.);
- b. Describe any circumstances under which the app can auto populate item bibliographical information from the catalog or from another source (such as an ISBN scan);

- c. Describe any other auto populate features provided by the app. Do not address the ability to auto populate the user's library bar code number and/or PIN, unless the functionality described here is different or separate from that covered under 3.2.1.3.4.b.

3.2.2.2. Library Information

1. Library staff contact information

It is considered desirable for the app to provide library staff contact information, as desired or specified by the library. Many libraries may wish to provide access by position title only, not by actual name of the individual, although some libraries may wish to provide at least the director's name.

- a. Describe any staff contact/directory information functionality provided by or through the app;
- b. Describe any ability that the library has to control the level of information that is provided;
- c. Describe the mechanism by which staff contact data is provided by the library to the app developers.

2. Events calendar

It is considered desirable that the library events calendar information be accessible via the app. The ability to automate the event calendar data transfer process is also desirable.

- a. Describe any library event calendar functionality or information that is made available via the app.
- b. Describe the mechanism by which library event data is provided by the library to the app developers. Describe any available automated transfer mechanisms (such as RSS feeds).

3. Social media

It is considered desirable that the app be able to provide access and functionality for the library's social media presence. At a minimum, the app should provide the ability to link to the library's social media sites. Ideally the app should provide the ability for the user to interact directly with the site through the app, enabling the user to easily take such actions as liking, sharing, commenting, reposting, etc.

Social media platforms frequently used by libraries can include:

- i. Blogs
- ii. Facebook
- iii. Twitter
- iv. LinkedIn
- v. MySpace
- vi. Google Plus+
- vii. LibraryThing, GoodReads, and similar sites
- viii. YouTube
- ix. Podcasting (iTunes, etc.)
- x. Pinterest
- xi. Flickr
- a. It is assumed that the app can provide links to any web site, including the library's social media sites. Enumerate the social media platforms with which the app is currently capable of interacting;
- b. Describe any social media site interactive capability or functionality that is built into the app.

- c. Describe any capabilities built into the app that include the ability for the user to authenticate to his/her own accounts on social media sites being utilized by the library.
- d. Describe the mechanism by which the library provides information on its social media accounts for inclusion in the app.

4. Customized branding

It is considered desirable that libraries have the option for customized branding in their individual versions of the app, including the ability to include the library's logo(s).

Describe any individual customization options available for participating libraries, and specify any additional costs, if applicable.

3.2.2.3. ILS Integration

1. Book check/scan feature

It is considered desirable that using the camera on their device(s), users can scan the UPC/ISBN/barcode on a book (or other item), and have the app automatically run a library catalog search to determine if the library has the item, enabling the user to easily place a hold, if desired.

Describe any features that provide for this type of activity by the app user.

2. Push notifications

It is considered desirable that the library be able to send standard notifications (items coming due, overdues, holds availability, etc.) to the end user through the app.

Describe any "push" notification capabilities provided through the app. Describe the specific technical format(s) utilized by the app for these types of notifications, e.g., texting, IM, e-mail, etc.

3.2.2.4. Product Features

1. Reading lists

It is considered desirable that the library be able to provide reading lists such as best seller lists, new acquisitions, staff recommendations, etc., through the app.

- a. Describe any functionality provided or built into the app for providing reading lists to users.
- b. Describe sources of such lists (e.g., library RSS feeds, catalog generated, third party providers) that are supported.
- c. Are any reading lists provided directly by the app vendor, and made available to libraries as part of the basic subscription, or as an add-on? If so, describe these, and list any applicable costs.

2. Reviews and recommendations

It is considered desirable that the library be able to provide [book] reviews, and recommendations through the app.

- a. Describe any functionality provided or built into the app for providing reviews and/or recommendations to users.
- b. Describe sources of such reviews or recommendations (e.g., RSS feeds, third party sources such as GoodReads, LibraryThing, commercial library vendors, etc.) that are supported.
- c. Are any review and/or recommendation sources provided directly by the app vendor, and made available to libraries as part of the basic subscription, or as an add-on? If so, describe these, and list any applicable costs.
- d. Describe any functionality provided by the app that allows library users to add their own reviews and recommendations or ratings for catalog materials. This can be part of a larger peer to peer recommendation system such as LibraryThing or Goodreads, or

operate independently of any third-party system and provide for sharing reviews and recommendations among Washington library users with access to the app.

3. Where else can I get it?

It is considered desirable that the app provide information on where else an item is available when the user's library does not have the item available.

- a. Describe in general terms any "Where else can I get it?" functionality provided by the app.

There are two levels of unavailability to consider: 1) the library does not own any copies of the item in question; 2) the library has copies, but all are checked out or otherwise unavailable.

- b. Describe how or if the app makes a distinction between the two levels of unavailability; can the library set separate parameters for how the app responds in the case of each type of unavailability? Can the patron be directed to a specific URL (such as a larger group catalog like <http://wayfinder.worldcat.org>)?

Ideally, the app should offer the user the opportunity to place a purchase and/or ILL (Inter-Library Loan) request with the library first, followed by other options for obtaining the item.

- c. Describe any functionality for linking to, or providing access to the library's purchase recommendation form(s) and/or ILL request forms. In their OverDrive services, some libraries have implemented a "Recommend to Library" feature. Describe any ability to interact with that aspect of the OverDrive service through the app.

The preferred alternate source to be offered first is another library, starting with the closest available location. Some libraries may find links to book sellers to be acceptable, other libraries may not. In the event that book seller links are available, libraries should have the option to turn off the purchase option, or if the option is turned on, libraries should receive compensation for any referrals that result in sales.

- d. Describe the type(s) of alternate sources available through the app, and describe any parameters for selecting or providing those sources that are customizable by the library.

3.2.3. Features which are also desirable, but less important

1. Virtual library card

It is considered desirable, but less important that the app function as a virtual library card, storing the user's library bar code in such a way that it can be displayed and scanned at a library checkout terminal, obviating the need for the user to carry a physical library card.

Describe any virtual library card functionality that can be provided via the app.

2. Support for QR codes

It is considered desirable, but less important that the app be able to support the use of QR codes. Describe any functionality related to QR codes that can be provided via the app.

3. Indoor maps

It is considered desirable, but less important that the app be capable of providing indoor maps for libraries similar to those from [Google's Indoor Maps](#) service.

Describe any capabilities for indoor mapping services that can be provided via the app.

4. Meeting room information

It is considered desirable, but less important that the app be capable of providing meeting room hours and availability, down to the branch level for multi-branch systems.

Describe any capability provided by the app for providing information on library meeting rooms, including size (capacity), hours, availability, and links to or actual functionality for online booking when available.

5. WorldCat integration

It is considered desirable, but less important that the app provide integration to OCLC's WorldCat (www.worldcat.org) service/database.

Describe any WorldCat data or functionality that is used by, included in, or provided through the app. If WorldCat data is used in providing services or features described elsewhere in the proposal, provide reference to those sections of the proposal.

6. Access to digital collections

It is considered desirable, but less important that the app provide access to digital collections such as those provided by the Washington State Library (see <http://www.sos.wa.gov/library/digcolls.aspx>, and especially Washington Rural Heritage, which provides access to collections from rural communities around the state, and involves many Washington libraries as partners), and to any similar collections provided by other Washington libraries.

Describe any capability for linking to and providing access to library digital collections through the app.

7. Creating personal lists

It is considered desirable, but less important, that the app allow users to create their personal lists of library materials and save these lists for later retrieval. Said lists should include call numbers when applicable so that the patron can use the list for retrieving items from the shelf when physically in the library. Other uses for such lists could include keeping track of books read, tracking books in a series, sharing lists with friends, posting to social media sites, and the like.

Describe any ability for the app user to create, save, and share personal lists of library materials whether located through the library catalog, or from other sources (such as library provided reading lists, scanned or keyed ISBN numbers, UPC codes, etc.).

8. Other features

Libraries are interested in any other features or specialized services that are available or that could be implemented, but which have not been specifically described anywhere else in the proposal, or in the list of features enumerated in sections 3.2.1., 3.2.2., or 3.2.3.

Describe any other features or services that Proposer can provide to enhance the app for Washington Libraries. Provide sufficient detail to clearly explain what each feature is, how it works, what its benefits or advantages are, and why libraries would want to include the feature. Include information on any data the library must supply to implement the feature(s), and the method by which that information will be supplied to the app developers.

3.2.4. Standard Business Considerations

1. License Agreement and/or Terms of Use

- a. Provide electronic (editable) copies of any license agreement(s) and/or terms of use that apply to either the library and/or its patrons including any "click-through" agreement that app users are expected to accept.
- b. Terms which require libraries to indemnify the Proposer or Contractor against the actions of the library's patrons are generally considered unacceptable. Indicate the degree to which terms and wording of these agreements may be negotiable.

2. Americans with Disabilities Act (ADA)

- a. Describe the extent to which the app will be ADA accessible and list any known incompatibilities.
- b. Does the app meet or comply with the Web Content Accessibility Guidelines (WCAG) 2.0 as found at <http://www.w3.org/TR/WCAG20/>?
- c. Does the app meet or comply with the US Government's Section 508 Guidelines found at <http://www.section508.gov/>?

3. Hours of Service

The app and its functionality should be available 24 hours per day, 365 days per year, with minimal downtime. The Contractor should not schedule regular downtime for system upgrades or maintenance during normal library business hours (i.e., between 8:00 a.m. and 11:00 p.m. Pacific Time any day of the week).

- a. How many hours a week are your app services available?
- b. What are your scheduled maintenance hours, if applicable?
- c. State the actual hours of availability 365 days per year based on data on system availability during the most recent 12 months.

4. Customer Support

- a. Describe the customer support that is available for library staff and for end users (library patrons).
- b. Do you provide a toll-free customer support number?
- c. What options (e.g., e-mail, web, chat, phone, etc.) are available to reach customer support staff?
- d. In Pacific Time, state the hours that customer support is available.

5. Technical Support

- a. Describe the technical support that is available for library staff and for end users (library patrons).
- b. Do you provide a toll-free technical support number?
- c. What options (e.g., e-mail, web, chat, phone, etc.) are available to reach technical support staff?
- d. In Pacific Time, state the hours that technical support is available.

6. Training and Help for End-Users

- a. Briefly summarize help and training and/or point of use materials that are available for end users.
- b. Are said materials available in electronic formats, such that they can be adapted or customized for local use? Are samples available (preferably online) for examination?
- c. Are online help files available? Describe or provide examples of (links to) such files.

7. Training for Library Staff

The provision of training contributes to increased usage and awareness of electronic tools such as the app.

- a. Describe any training program that is provided by the Proposer for library staff
- b. Are sample training materials available (preferably online) for examination?

8. Promotion and Marketing

A public awareness campaign will be mounted to ensure that end users are aware of the app offered by libraries to the people of the state. Please describe the type of assistance that your company would offer to this campaign should you be awarded a contract.

- a. Describe any promotional and/or marketing materials that your company will make available to libraries to assist them in promoting the app to their patrons (e.g., printed materials, press release templates, public service announcements, web banners, buttons, etc);
- b. Are printed materials available to libraries in bulk at no additional charge? Describe promotional materials you would provide at no charge, such as bookmarks, posters, table tents, shelf hangers, etc.
- c. Are sample promotional materials available (preferably online) for examination?

- d. Are marketing materials available in electronic form such that they can be easily adapted or customized for local use? (End-user training materials you provide to libraries should be discussed under Question 3.2.4.6.).
- e. Describe any public service announcements, or other mass media marketing that your company is prepared to provide (to media outlets, or to libraries).
- f. Does your company employ web-based advertising (e.g., Google keywords)? If so, describe any assistance in this area that your company is prepared to provide as part of this contract.

C. Project Schedule – Include a project schedule indicating when the elements of the work will be completed and when deliverables, if any, will be provided.

As per Section 2.2 of this document, the “ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES,” it is intended to have a contract in place by March 1. Development of the application is expected to begin immediately, once the contract is executed.

Funding for the development of the app will come from LSTA funds which expire as of September 30, 2013. Therefore, the development of the app must be substantially completed before that date, and must actually be implemented and “live” for at least two or more “testbed” libraries, one of which will be the Washington State Library itself, before that date.

Ideally, the app should be essentially completed by no later than August 31, 2013, so that the period between August 31 and September 30 can be used for bringing the app online for the testbed libraries, ensuring that performance of the app is satisfactory, and meets the contractual specifications, and providing adequate time for the generation and payment of development phase invoice(s) prior to September 30.

Meeting the above deadline will be a crucial contractual requirement for whichever Proposer is awarded a contract under this RFP.

It is expected that the period between September 30 and December 31, 2013 will be used to bring the other participating libraries up live on the app, and to resolve any remaining technical issues with the app.

Any launch of the app by any library prior to January 1, 2014, will be regarded as a “soft launch” and will not result in any immediate subscription costs to the library or libraries. The official subscription period payable under this contract will be from January 1, 2014 through December 31, 2014. It is expected that all public and academic libraries participating in this project will be live by January 1, 2014, assuming that the libraries act in good faith, providing any required information to the Contractor in a timely fashion. The Contractor is expected to provide a timeline with clearly indicated deadlines for provision of library data by libraries to the Contractor. While the project management at the Agency will make every effort to encourage libraries to submit their data, the responsibility will ultimately rest with the libraries themselves.

Neither the Contractor nor the Agency can be held responsible if participating libraries fail to meet the specified deadlines. Nevertheless, describe any contingency plans for dealing with a situation in which libraries have not provided required information or data to the app developers.

D. Deliverables – Fully describe deliverables to be submitted under the proposed contract.

Washington libraries, as represented by the Agency and this project's Advisory Committee, are looking for a variety of features to be included in a statewide library mobile application or “app.” It is not expected that all of the desired features will necessarily be available at this time from any particular vendor. Part of the purpose of the procurement process and the RFP is to determine what features are available from which vendors, and to award a contract based on the Proposal that seems to best meet the needs of the libraries in Washington State, in terms of features, pricing, and ease of implementation.

The deliverables under this contract will consist of the mobile application (app) as described in the Contractor's Proposal, particularly the portions of the Proposal responding to Sections 3.2.1, 3.2.2, 3.2.3, and 3.2.4. of this RFP, plus the items described in Section E, Outcomes and Performance Measures, which are intended to delineate the app features, functionality, and related services available from the Contractor.

From the feature set outlined in the Contractor's Proposal, the Agency and the project's Advisory Committee will select the features to be developed and included in the statewide mobile app, and those features will be specified in the contract. If there are features offered by the Contractor which the Agency chooses not to implement, those will also be indicated in the Contract.

E. Outcomes and Performance Measurement – Describe the impacts/outcomes the proposers propose to achieve as a result of the delivery of these services including how these outcomes would be monitored, measured and reported to the state agency.

Some of the project's outcome and performance measures that have been proposed to the Paul G. Allen Family Foundation require cooperation and assistance from the Contractor (Items 1. – 3. below):

1. The project will anonymously track the number of times the library mobile app is downloaded as well as the number and frequency of subsequent uses. These usage statistics are to be provided by the app vendor, and will provide a measure of user awareness and satisfaction with the app. That is, repeated ongoing use of the app will be interpreted as an indication of user satisfaction.

The project will also compare the download and usage statistics over time, this data will be gathered in 2014. Monthly usage statistics (downloads and subsequent usage) are considered essential to this purpose.

Describe how the Proposer/Contractor can provide the data needed for this purpose. If that information is already included in Section 3.2.1.1.4. of the technical requirements, which is devoted to analytics and usage statistics, it is acceptable to refer to that section, as opposed to repeating the information here.

2. Users of the library mobile application will report that it is easier and more convenient to access library resources using the mobile application than it was previously. This data will be gathered by a survey beginning six months before the completion of the grant, i.e., June 2014.

It is proposed that this data be gathered through the application itself. The vendor is to work with the project to enable a brief optional survey to pop up on the application. Users will be provided with an incentive to complete the survey (the opportunity to be entered in a prize drawing, or something similar).

Describe the Proposer's ability (or inability) to incorporate this data gathering feature into the app by the time frame described (June, 2014).

3. When possible and practical, representative libraries will be asked to compare pre and post app measures of library usage such as the number of new library cards issued, gate counts, hits on library web sites, online resources, and social media sites, etc., and these indicators, combined with the mobile app usage statistics, will be used to gauge the impact of the app on library use. This data will be gathered and assessed in 2014.

Describe the Proposer's ability (or inability) to count and report on any specific library activities as described in this item (No. 3 under Outcomes and Performance Measures) that are initiated and/or completed through the app. Clearly list those items which can be performed through the app, and indicate for each item, if it can be tracked, and if the volume of activity specific to that item through the app can be reported.

4. Describe any other outcomes and performance measures available from the Proposer, and especially those which have been successfully used in the past, with other clients. Provide examples of any relevant reports not elsewhere provided.

F. Risks - Please address potential risks associated with this contract.

Specific Risks

1. Provide a business continuation plan that illustrates how Proposer will monitor and manage such potential risks as low client demand, staff turnover, loss of facility and/or key staff/personnel.

2. A significant risk is the possibility of not completing development work in time with the proposed schedule. Address how Proposer proposes to insure that development work will be completed in a timely fashion, such that payment can be made with LSTA funds set to expire September 30, 2013.

Overall Risk

1. Define any other risks Proposer identifies as being significant to the success of the project. Include how Proposer would propose to effectively monitor and manage these risks, including reporting of risks to the RFP Coordinator (who will also serve as one of the project managers) and/or the agency's contract manager.

3.3 MANAGEMENT PROPOSAL

A. Project Management (SCORED)

1. **Project Team Structure/Internal Controls** - Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Include who within the firm will have prime responsibility and final authority for the work.

2. **Staff Qualifications/Experience** – Identify key staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel. The Proposer must commit that staff identified in its proposal will actually perform the assigned work.

B. Experience of the Proposer (SCORED)

1. Describe the experience the Proposer and any subcontractors have in providing services similar to those described in this RFP, especially services provided to libraries.

2. Describe other relevant experience that indicates the qualifications of the Proposer, and any subcontractors, for the performance of the potential contract.

3. Include a list of contracts the Proposer has had during the last three years that relate to the Proposer's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.

4. Detail the size of the Proposer's current library customer base: the number of libraries in how many states/provinces, including any consortia, or statewide contracts currently in place.

C. References (SCORED)

List names, addresses, telephone numbers, and fax numbers/e-mail addresses of three business references for whom work has been accomplished and briefly describe the type of service

provided. The Proposer must grant permission to the Agency to contact the references. Do not include current Agency staff as references. References will be contacted for the top-scoring proposal(s) only.

D. Related Information (MANDATORY)

1. If the Proposer or any subcontractor contracted with the state of Washington during the past 24 months, indicate the name of the agency, the contract number and project description and/or other information available to identify the contract.
2. If the Proposer's staff or subcontractor's staff was an employee of the state of Washington during the past 24 months, or is currently a Washington state employee, identify the individual by name, the agency previously or currently employed by, job title or position held and separation date.
3. If the Proposer has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Proposer's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
4. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Proposer's position on the matter. The Agency will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the Proposer in the past five years, so indicate.

E. OMWBE Certification (Optional)

Include proof of certification issued by the Washington State Office of Minority and Women-Owned Business if certified minority-owned firm and/or women-owned firm(s) will be participating on this project.

3.4 COST PROPOSAL

The maximum fee for the public library portion of this contract must be \$200,000 or less to be considered responsive to this RFP. The maximum fee for the academic library portion of the contract is not specified, but should be in line with the public library fees.

The evaluation process is designed to award this procurement not necessarily to the Proposer of least cost, but rather to the Proposer whose proposal best meets the requirements of this RFP. However, Proposers are encouraged to submit proposals which are consistent with State government efforts to conserve state resources.

The agency reserves the right to clarify any pricing information provided by any Proposer. No Proposer will be able to alter its submitted pricing or product description as the result of the clarification process.

A. Identification of Costs (SCORED)

Identify the total cost to be charged for performing the services necessary to accomplish the objectives of the contract. It is hoped that by offering the app to a wide range of libraries, the volume of participating libraries will enable lower pricing options through shared development costs and economies of scale.

Any contract offered under this RFP will pay for the development cost and one year's subscription to the service for all public library entities in Washington that wish to participate. A list of eligible public libraries with the most current available population served figures can be found in Exhibit C.

It is also the intention of this project to offer the app to non-profit academic libraries as well, although these libraries will pay their costs with their own funds. A list of potentially eligible academic institutions with the most current available enrollment and/or head counts can be found in Exhibit C.

Please respond to each numbered item below:

1. The Contractor must be prepared to invoice academic libraries individually, and public libraries individually after the first year of the subscription. It is strongly preferred that any costs associated with individual invoicing be built into the overall pricing structure.

The Contractor will be required to collect and pay Washington State sales tax, if applicable. However, libraries are eligible for an exemption to the tax on "digital products or remote access software that will be made available free of charge for the use or enjoyment of the general public." Libraries claiming the exemption will file an exemption certificate with the Contractor. See <http://www.sos.wa.gov/quicklinks/tax> for more information.

2. A tiered pricing structure that is based on per capita population served for public libraries (or a similar measure, such as annual circulation), and on FTE (Full-Time Equivalent) enrollment for academic libraries is preferred.

3. The cost must be subdivided between the development cost, and the cost for one year's subscription to the service, with the total cost for each clearly delineated.

4. It is considered desirable (but not essential) that libraries have pricing options for services and features of the app, i.e., that there be a suite of basic (but adequate) features and services available to all participating libraries for the best possible price, with a more advanced set of features and/or services available for those libraries that need or want them, and are willing to pay a higher price for more features, and/or more customization, etc.

5. Keep in mind that not all eligible libraries may choose to participate. The quoted price structure must accommodate a situation in which some libraries participate, and some do not. For example, a per library "list" price could be provided for all libraries listed in Exhibit C, and then a discounted price scale based on various levels of participation could be offered, with higher levels of discount for a higher participation rate. It is unlikely that the final participation levels will be known during the development phase of the project; it is anticipated that development and recruitment efforts will take place simultaneously. Recruitment is the responsibility of the Agency and is not the responsibility of the Contractor.

6. A creative approach to pricing is encouraged. For example, the discounted pricing based on volume of participation could be offered for the subscription fee only, with a flat rate for the development costs. Or a portion of the development cost could be rebated against the subscription cost based on the volume of participation.

7. Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Office of Minority and Women's Business Enterprises.

8. A library should not be penalized for being an early adopter of the Proposer's services; therefore, it is considered desirable that the pricing structure take into account Proposer's existing customers within the state, and that such customers be able to take advantage of any group discount(s) made available through any contract resulting from this RFP. List any existing public or academic library customers as of the date of the Proposal. Describe how existing customers will be treated under any contract awarded under this RFP.

9. It is considered highly desirable that costs remain as nearly level as possible in the years immediately following this contract. Cost increases should be minimal and should be directly related to actual cost increases, and/or justified by reference to standard cost of living indices or similar measures. State the Proposer's intent with regard to pricing after the term of this contract.

10. Provide the total price for the services offered in the Proposal, and describe any pricing options and discount structures that are offered.

B. Computation

Each numbered item under "A. Identification of Costs" will be separately scored.

The score for the purposes of comparing the overall cost proposals will be computed by dividing the lowest cost bid received by the Proposer's total cost. Then the resultant number will be multiplied by the maximum possible points for the cost section.

4. EVALUATION AND CONTRACT AWARD

4.1 EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by the Agency, which will determine the ranking of the proposals.

Agency, at its sole discretion, may elect to select the top-scoring firms as finalists for an oral presentation.

4.2 EVALUATION WEIGHTING AND SCORING

The following weighting will be assigned to the proposal for evaluation purposes:

Technical Proposal – 50%

Management Proposal – 15%

Cost Proposal – 35%

If oral presentations are scheduled, the weighting will be as follows:

Technical Proposal – 50%

Management Proposal – 10%

Cost Proposal – 30%

Oral Presentation – 10%

4.3 ORAL PRESENTATIONS MAY BE REQUIRED

Written submittals and oral presentations, if considered necessary, will be utilized in selecting the winning proposal. The Agency, at its sole discretion, may elect to select the top scoring finalists from the written evaluation for an oral presentation. Should the Agency elect to hold oral presentations, it will contact the top-scoring firm(s) to schedule a date, time and location. Commitments made by the Proposer at the oral interview, if any, will be considered binding.

4.4 NOTIFICATION TO PROPOSERS

Firms whose proposals have not been selected for further negotiation or award will be notified by e-mail.

4.5 DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Upon request, a debriefing conference will be scheduled with an unsuccessful Proposer. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Proposer letter is e-mailed to the Proposer. The debriefing must be held within three (3) business days of the request.

Discussion will be limited to a critique of the requesting Proposer's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

4.6 PROTEST PROCEDURE

This procedure is available to Proposers who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Proposer is allowed three (3) business days to file a protest of the acquisition with the RFP Coordinator. Protests may be submitted by facsimile, but should be followed by the original document.

Proposers protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to Proposers under this procurement.

All protests must be in writing and signed by the protesting party or an authorized Agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included. All protests shall be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of the evaluator.
- Errors in computing the score.
- Non-compliance with procedures described in the procurement document or Agency policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, or 2) Agency's assessment of its own and/or other agencies needs or requirements.

Upon receipt of a protest, a protest review will be held by the Agency. The Agency director or an employee delegated by the Director who was not involved in the procurement will consider the record and all available facts and issue a decision within five business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Proposer which submitted a proposal, such Proposer will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold the Agency's action; or
- Find only technical or harmless errors in the Agency's acquisition process and determine the Agency to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide the Agency options which may include:
 - Correct the errors and re-evaluate all proposals, and/or
 - Reissue the solicitation document and begin a new process, or
 - Make other findings and determine other courses of action as appropriate.

If the Agency determines that the protest is without merit, the Agency will enter into a contract with the apparently successful contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

5. RFP EXHIBITS

- Exhibit A Certifications and Assurances
- Exhibit B Service Contract including General Terms and Conditions (GT&Cs)
- Exhibit C Library Data

CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by the Agency without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
5. I/we understand that the Agency will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of the Agency, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly to any other Proposer or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

Signature of Proposer

Title

Date